

# Project Management Handbook

## D1.1

<b>Grant Agreement No.</b>	101135931
<b>Project Start Date</b>	01.01.2024
<b>Duration of the project</b>	42 months
<b>Deliverable Number</b>	D 1.1
<b>Deliverable Leader</b>	INRiM
<b>Dissemination Level (PU, SEN)</b>	PU
<b>Status</b>	Second Draft
<b>Submission Date</b>	06.02.2024
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**Funded by  
the European Union**

*This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement N° 101135931.*

*The opinions expressed in this document reflect only the author's view and in no way reflect the European Commission's opinions. The European Commission is not responsible for any use that may be made of the information it contains.*

## Modification Control

VERSION	DATE	DESCRIPTION AND COMMENTS	AUTHOR
0.1	01.02.2024	First Draft	Giulia Aprile - INRiM
0.2	06.02.2024	Second Draft	Giulia Aprile - INRiM
0.3	23.02.2024	Third Draft	Giulia Aprile - INRiM

## List of contributors

- Giulia Aprile
- Chiara Gionco (*internal expert for reviewing*)

## List of Acronyms

Acronym	Full name
CA	Consortium Agreement
CFS	Certificate on the Finance Statement
CH	Swiss Confederation
CSOC	Chip-Scale Optical Clock
DoA	Description of action
EB	Executive Board
EC	European Commission
EOSC	European Open Science Cloud circuit
EU GA	European Grant Agreement
GA	General Assembly
MEMS	Micro Electro-Mechanical Systems
QUANTIFY	Quantum enhANced phoTonic Integrated sensors For metrologY
OMO	Optomechanical Oscillator
OPM	Optically-Pumped Magnetometer
PICSq	Photonic Integrated Circuit Squeezer
PO	Project Officer from European Commission
TL	Task Leader
TPOC	Two-Photon Optical Clock
WP	Work Package
WPL	Work Package Leader

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# 1. Introduction

## 1.1 Purpose of this document

This Project Handbook has mainly two functions:

- to be a **reference source** for all consortium partners regarding the day-to-day activities;
- to provide all the **standard elements** of the project e.g. project reports, deliverables, etc. through the use of agreed procedures and templates.

It will be a dynamic document and will be updated as required throughout the project.

## 1.2 Precedence

The general principles for the project execution are defined in the EU Grant Agreement (EU GA), the Description of the action (DoA, Annex 1 to the EU GA) and the Consortium Agreement (CA). The Project Handbook does not replace any of these established agreements, nor does it replace any of the EU guidelines for project implementation and documentation.

Where there are any inconsistencies between these documents, the following order of precedence should be applied:

1. EU Grant Agreement including Description of the action, also referred to as the Grant Agreement (EU GA) Annex 1;
2. Consortium Agreement (CA);
3. Project Handbook (present document).

## 2. General Project Information

<b>Title</b>	Quantum enhANced phoTonic Integrated sensors For metrologY
<b>Acronym</b>	QUANTIFY
<b>Grant Agreement No.</b>	101135931
<b>Funding Programme</b>	Horizon Europe
<b>Call</b>	HORIZON-CL4-2023-DIGITAL-EMERGING-01-CNECT
<b>Type of action</b>	HORIZON-RIA
<b>Project Start Date</b>	01.01.2024
<b>Duration of the project</b>	42 months
<b>Budget</b>	3.000.000,00 € from EC, 1.000.000,00 € from CH

<b>Project Coordinator</b>	<b>Project Coordinator Deputy</b>
<b>Giulia Aprile</b> <b>INRiM</b> Strada delle Cacce 91, 10135, Torino + 39 0113919214 g.aprile@inrim.it	<b>Chiara Gionco</b> <b>INRiM</b> Strada delle Cacce 91, 10135, Torino + 39 0113919214 c.gionco@inrim.it

<b>N.</b>	<b>Partner name</b>	<b>Partner short name</b>	<b>Country</b>
1	Istituto Nazionale di Ricerca Metrologica	INRiM	Italy
2	Centre National de la Recherche Scientifique	CNRS	France
3	Université Paris Cité	UPCité	France
4	Conservatoire National des Arts et Metiers	CNAM	France
5	Laboratoire National de Metrologie et d'Essais	LNE	France
6	Fundacio Institut de Ciencies Fotoniques	ICFO-CREA	Spain
7	Universiteit Gent	UGent	Belgium
8	Lionix International BV	Lionix INT. BV	Netherlands
9	QuiX Quantum BV	QUIX QUANTUM BV	Netherlands
10	Thales	THALES	France
11	Universitaet Hamburg	UHAM	Germany
12	Sorbonne Université	SU	France
13	Centre Suisse d'Electronique et de Microtechnique SA – Recherche et Developpment	CSEM	Switzerland

## 3. Legal Aspects

### 3.1 Grant Agreement

The Grant Agreement forms the legal basis for the implementation of the project. It is the contractual document signed by all the project partners which defines the rights and obligations of the Consortium regarding the EC. It consists of:

- Terms and Conditions (the core contract);
- Annex 1 Description of the action (DoA, Part A and B);
- Annex 2 Estimated budget for the action;
- Annex 2a Additional information on unit costs and contributions;
- Annex 3 Accession Form for Beneficiaries;
- Annex 4 Model for the financial statements;
- Annex 5 Specific Rules.

Although the core contract is signed between the EU and the Coordinator of the project, all partners have become individual contract partners with the commission by signing the Accession Forms.

The Grant Agreement must be kept by all partners and should be provided to the auditor in case of an audit. It is downloadable in the participant portal and in the internal partner repository (a SharePoint, based on Microsoft Teams channel, QUANTIFY Project/General/File/EU-Participant Portal Docs/ QUANTIFY\_Grant Agreement - GAP-101135931) of the QUANTIFY project.

### 3.2 Consortium Agreement

Whereas the Grant Agreement is signed between the EU and the partners, the Consortium Agreement is signed between the partners themselves. It arranges in more detail the provisions of the Grant Agreement, such as, but not limited to: responsibilities of Parties, governance structure, financial issues, payments, management, decision making, conflict resolution, intellectual property rights and liability.

The Consortium Agreement must also be kept by the partners and must be shown in case of audits. It is downloadable in the internal partner repository (QUANTIFY Project/General/File/Consortium Docs/Consortium Agreement) of the QUANTIFY project.

### 3.3 Amendments

During the project, circumstances may arise to call for a request to the EU for an amendment of the Grant Agreement. Reasons may vary, but could be:

- Change of partner(s);
- Change of legal entity;
- Changes in the Budget (*EU GA: Annex 2*);
- Changes in the DoA (*EU GA: Annex 1*).

In case an amendment is needed the coordinator shall submit such a request after an autonomous decision by all partners in the General Assembly. After approval, the Coordinator shall distribute

the revised Grant Agreement to the partners, replacing former versions.

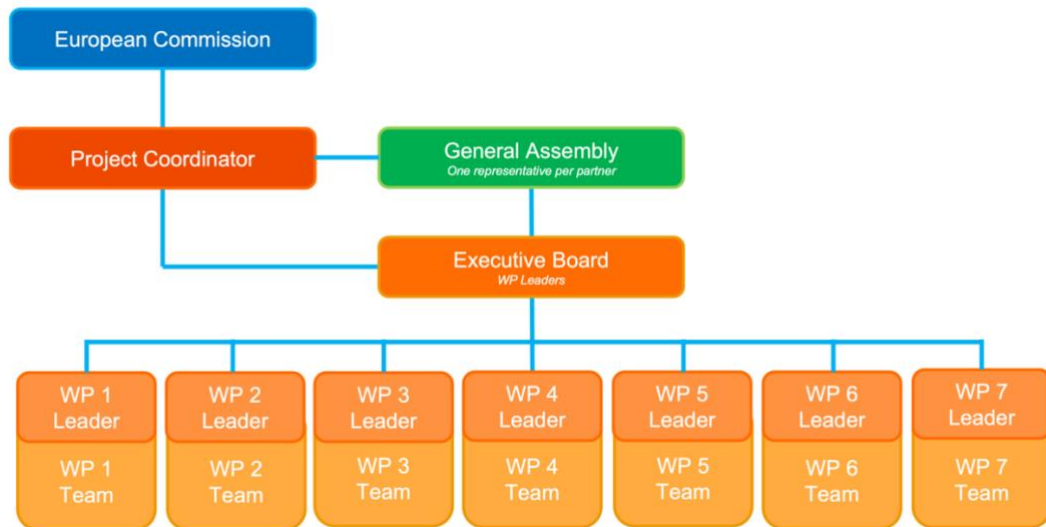
Budget changes that do not affect the content of DoA can be taken care by the consortium itself; decision through the General Assembly and inform the Project Officer. Amendments may be requested by any of the project partners.



## 4. Management Structure and Procedures

### 4.1 Project Organizational Structure

The project organizational structure is represented in the following diagram:



The project organizational structure has multiple layers of decision-making:

#### GENERAL ASSEMBLY (GA)

The General Assembly is the decision-making body of the consortium, it is chaired by the Coordinator.

The GA consists of one representative from each partner in the consortium.

The following decisions shall be taken by the General Assembly: 1) Content, finances and intellectual property rights; 2) Evolution of the consortium; 3) Breach, defaulting party status and litigation.

The GA shall be free to act on its own initiative to formulate proposals and take decisions. In addition, all proposals made by the Executive Board shall also be shared by the GA.

**Table 1. General Assembly Members**

N.	Partner short name	Name	E-mail
1	INRiM	Giulia Aprile	g.aprile@inrim.it
2	CNRS	Remy Braive	remy.braive@c2n.upsaclay.fr
3	UPCité	Remy Braive	remy.braive@c2n.upsaclay.fr
4	CNAM	Stephan Briaudeau	stephan.briaudeau@lecnam.net
5	LNE	Olga Kozlova	Olga.Kozlova@lne.fr
6	ICFO-CREA	Morgan Mitchell	morgan.mitchell@icfo.eu
7	UGent	Bart Kuyken	bart.kuyken@ugent.be
8	Lionix INT. BV	Atland Bokski	a.boksi@lionix-int.com
9	QUIX QUANTUM BV	Rolf Evenblij	r.evenblij@quixquantum.com
10	THALES	Gilles Feugnet	gilles.feugnet@thalesgroup.com
11	UHAM	Roman Schnabel	roman.schnabel@physnet.uni-hamburg.de
12	SU	Tristan Briant	tristan.briant@lkb.upmc.fr
13	CSEM	Davide Grassani	davide.grassani@csem.ch

All decisions of the GA are taken with 2/3 majority votes, though the objective is unanimity. The quorum of the GA meetings is 2/3 of its members.

Decisions regarding the integration of a new party to the Project or regarding suspension or termination of the Project or part of it require the agreement of all Parties.

On a regular basis, the GA members will communicate via e-mail and Google Meet, or Teams, conferences.

#### EXECUTIVE BOARD (EB)

The Executive Board manage the technical and scientific aspects within and between the WPs, to take decision about the critical issues, review research activity, organize annual project meetings, collect results in trusted selected database and assess and review Communication, Dissemination and Exploitation Plan during the lifespan of the project according to the Results and their strategic impact.

**Table 2. Executive Board Members**

WP	Topic	Name / Partner	E-mail
WP1	Coordination and project management	Giulia Aprile INRiM	g.aprile@inrim.it
WP2	Realization of photonic integrated building blocks	Bart Kuyken UGent	bart.kuyken@ugent.be
WP3	Development of an optically pumped magnetometer	Morgan Mitchell ICFO-CREA	morgan.mitchell@icfo.eu
WP4	Development of a Rb-based Optical Clock	Laurent Balet CSEM	laurent.balet@csem.ch
WP5	Development of an Optomechanical Thermometer	Tristan Briant SU	tristan.briant@lkb.upmc.fr
WP6	Metrology Assessment of key building blocks and quantum sensors	Giulia Aprile INRiM	g.aprile@inrim.it
WP7	Dissemination, exploitation and impact	Roman Schnabel UHAM	roman.schnabel@physnet.uni-hamburg.de

Each EB member has a deputy, who is always invited to attend EB meetings.

The leader of WP1, the Project coordinator, or her deputy, shall chair all meetings of the EB, unless decided otherwise by a majority of two-thirds.

#### WORK PACKAGE LEADERS (WPLS) AND TASK LEADERS (TLs)

Work Package Leaders are responsible for workflow, coordination and progress within their WPs and other WPs. They ensure that the Coordinator is informed about WP developments. Adjustment to work must be agreed by Coordinator.

The WP Leaders and the Task Leaders will be responsible for the detailed implementation of the work packages and tasks and preparation of the corresponding deliverables and milestones. The WPLs perform operative management at the level of their work package and are responsible for the following activities:

- Reporting progress during the project meetings, at the executive board meetings and in the deliverables “Project activity and management report” (D1.3, D1.4, D1.5, D1.6);
- Immediately reporting major decisions related to any deviation to the work plan;
- Coordinating the activities of the task leaders;
- Highlighting any partners whose contributions are of insufficient or of unacceptable quality.

The WPLs report to the EB and to the GA (if the latter requires more detailed information on some issue). The TLs assist the WPLs in planning, managing and performing their respective tasks in

the WP context.

The list of the WPLs is reported in the Table 2. The list of the TLs is reported within the project SharePoint (QUANTIFY Project/General/File/Consortium Docs/Mailing lists).

#### **PROJECT COORDINATOR**

The Project Coordinator is responsible for efficient management of the project and individual activities with respect of time, budget and quality.

The QUANTIFY project is coordinated by INRiM and acts as the intermediary between the partners and the European Commission (Funding Authority).

The coordination of the project is performed at two levels:

- Scientific: taking care of the scientific development of the project. The main responsibility is to ensure that the main goals of the project are pursued and to verify the quality of all deliverables resulting from the project.
- Management: taking care of financial, legal, administrative as well as on organizational matters.

The project coordinator work to guarantee a smooth project communication internally (within the project) and externally (with the EU and the public at large).

## **4.2 Meetings**

Project meetings are plenary meetings and they will take place twice a year, once in person and once remotely. They include a General Assembly meeting and an Executive Board meeting.

Executive Board meetings will take place monthly by teleconference and once a year in person. Each WPLs should report the progress to the EB and the Coordinator.

Technical meetings of each project partner may also be held by teleconference or other telecommunication means.

**Costs** for travel and accommodation to participate to these meetings should be covered by each partner own budget.

## **4.3 Information Flows**

#### **SCIENTIFIC INFORMATION FLOW**

The WP leaders, as well as the Project Coordinator, are key figures in the management of the technical aspects within the project. Within each WP, all the technical issues must be transmitted from each partner to the WP Leader. The Work Package Leader will be the responsible for dealing with the issue raised and solving it. In the case that the issue cannot be solved, it will be transmitted to the Executive Board and the Project Coordinator.

The Executive Board and the Project Coordinator will resolve the issues put up by the WP Leaders or will transmit them to the General Assembly if necessary.

All relevant issues with an impact on the work and planning of the project will be discussed with the General Assembly.

#### **ADMINISTRATIVE INFORMATION FLOW**

Administrative information includes any information related to the administrative procedures of the project, including financial issues. Information related to the beneficiaries participating in the project is also part of the administrative information of the project and any changes in this information (legal information, change of name of the organization, change of authorized representatives of each organization, etc.) has to be transmitted as soon as possible to the Project Coordinator in order to take the necessary measures.

Administrative information must be submitted directly from each partner to the Project coordinator.

## 5. Communication

### 5.1 Internal communication

Internal communication is considered the communication within the Consortium.

#### E-MAIL

Many people may be working on a number of different projects and are likely to receive numerous emails every day, therefore, a standard subject title is proposed. This helps to quickly recognize the project related emails.

Project related emails should include in the subject title: 'QUANTIFY' and WP number (if applicable) followed by a more specific description of the subject, deadline for feedback or reply, see below an example:

**Subject: [QUANTIFY] - Kick off meeting minutes: till Jan 21<sup>th</sup> 2024**

Furthermore, it is required to copy the coordinator ([g.aprile@inrim.it](mailto:g.aprile@inrim.it)) in most important email communications.

There will be different mailing lists, which can be found on the SharePoint Team (QUANTIFY Project/General/File/Consortium Docs/QUANTIFY\_ Mailing lists\_aaaammdd) together with the contact list. Required changes can be sent to the coordinator ([g.aprile@inrim.it](mailto:g.aprile@inrim.it)).

#### SHAREPOINT/INTERNAL COMMUNICATION PLATFORM

A project SharePoint, based on Microsoft Teams (QUANTIFY Project), was set up to act as repository for all working documents, minutes and reports.

Every member of the consortium has access to the SharePoint Team. In case of problems/need for a new account, please contact: [g.aprile@inrim.it](mailto:g.aprile@inrim.it)

#### Permission levels

There are not specific permission levels. However, to better manage the team, WP leaders and project coordinators are invited to use the SharePoint site to read, download, edit and upload (final) documents.

Other partners can use this SharePoint to read and download project documentation. In case they want to upload a final document, they are invited to contact their WP leader or the project coordinator.

### 5.2 External communication

External communication is considered towards parties outside the consortium, target groups of the project, stakeholders and the EU Project Officer.

The external communication is part of **WP7 Dissemination, exploitation and impact** whose WPL is UHAM (Roman Schnabel, [roman.schnabel@physnet.uni-hamburg.de](mailto:roman.schnabel@physnet.uni-hamburg.de)). However, INRiM, as coordinator, also plays an important role in this WP. In fact, it is responsible for 3 of the 5 expected deliverables.

Communication and dissemination of project results is a crucial part of QUANTIFY project. Project partners will find more information in deliverable 'D7.1 Communication, dissemination and exploitation Plan, due in June 2024 (M6), and updated throughout the project.

### 5.3 Project website

The project website is set up for external communication purposes. It can be found at [www.quantify-project.eu](http://www.quantify-project.eu). The project website is created with information about the project, its objectives, results, partners and events.

### 5.4 General Requirements

Consortium partners must include in every communication activity related to the action (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant:

- Unless otherwise agreed with the granting authority, the **acknowledge EU support** and display the [European flag \(emblem\) and funding statement](#):



**Funded by  
the European Union**

The emblem must remain distinct and separate and cannot be modified by adding other visual marks, brands or text.

Apart from the emblem, no other visual identity or logo may be used to highlight the EU support.

When displayed in association with other logos (e.g. of beneficiaries or sponsors), the emblem must be displayed at least as prominently and visibly as the other logos.

- Only where appropriate, the logo shall include the following text (Disclaimer):  
*'This project (QUANTIFY) has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement N° 101135931'.*  
*'The opinions expressed in this document reflect only the author's view and reflects in no way the European Commission's opinions. The European Commission is not responsible for any use that may be made of the information it contains.'*
- the **project logo**. You can find the logo on the SharePoint (WP7/File/Deliverables/D7.2 – Communication Pack). It is recommended to always place the project logo on the front page of the document and the EU logo at the left side of the footer of the first page in the document.

## 5.5 Document standard/Templates

All public documentation needs to conform the document standards provided by the Project Coordinator. The document standard could be used for:

- Official EU reports (such as Periodic, Final);
- Public documents by the consortium;
- Project deliverables (in a report format); and
- any documents that are declared as public by the consortium.

All project templates (deliverables, presentations, posters, minutes, ...) are saved on SharePoint (WP1/File/Deliverables/D1.1 – Project management handbook, standard documentations, and internal document repository and management).

For deliverables, documents related to the meetings, or presentations to conferences you shall follow the instruction below to title the documents.

	Deliverables	Meetings	Conferences
<b>Part 1</b>	QUANTIFY	QUANTIFY	QUANTIFY
<b>Underscore</b>	–	–	–
<b>Part 2</b>	Deliverable number [Dx.y] [x=WP number, y=deliverable number]	Type of document (i.e. Agenda, Minutes, Presentation) In case of presentation, include WP number.	Event title
<b>Underscore</b>	–	–	–
<b>Part 3</b>	Short explanatory <b>title</b> for the document.	<b>Date</b> and <b>location</b> of the meeting	<b>Date</b> and <b>location</b> of the meeting
<b>Underscore</b>	–	–	–
<b>Part 4</b>		Short name of <b>organisation</b> and <b>Initials</b> of presenter	Short name of <b>organisation</b> and <b>Initials</b> of presenter
<b>Underscore</b>	–	–	–
<b>Part 5</b>	"v" and number of revision of this specific report [v0.1=draft version, v1.0=final version]	"v" and number of revision of this specific report [v0.1=draft version, v1.0=final version]	"v" and number of revision of this specific report [v0.1=draft version, v1.0=final version]

Deliverables documents
[QUANTIFY_Dx.y_Title_v0.1_date of submission, when submitted] example: QUANTIFY_D1.1_ProjectHandbook_v0.1 / QUANTIFY_D1.1_ProjectHandbook_v1.0_20240228
Meeting documents
[QUANTIFY_Type of Doc_Location_YYYYMMDD_Organisation_Initials)_v0.1] example: QUANTIFY_Agenda_Turin_20240111_v0.1 example: QUANTIFY_(WPx_)Presentation_Turin_20240111_INRiM_v0.3 example: QUANTIFY_(WPx)_MoM_20240111_v0.1
Conference presentations
[QUANTIFY_Event_Location_YYYYMMDD_Initials/Organisation_v0.1] example: QUANTIFY_KickOff2024_Turin_20240111_INRiM_v0.1

For internal project documents, it is also advised to apply this standard, such as WP meeting agenda and minutes.

The templates could suffer modifications during the project duration so it is recommended to download the templates from the internal repository each time an official QUANTIFY document is going to be generated.

If other templates will be needed by the Consortium, the Coordinator will implement the list and the communication materials.

## 6. Reporting

### 6.1 Reporting activities towards the EC

Reporting is dealt in *Article 21 – Reporting* of the GA and specifically in the Data Sheet.

Throughout the lifetime of the project there are:

- Continuous reporting;
- Periodic reporting.

#### CONTINUOUS REPORTING

The beneficiaries must continuously report on the progress of the action (e.g. deliverables, milestones, critical risks, publications, results, dissemination and communication activities, etc.), in the Portal Continuous Reporting tool and in accordance with the timing and conditions it sets out (as agreed with the granting authority).

For each Deliverable, a single file (max 52MB) can be uploaded. Consortium partners can find the deliverable file format within the SharePoint (WP1/File/Deliverables/D1.1 – Project management handbook, standard documentations, and internal document repository and management). For the other points, all the related information must be written directly within the Portal.

#### PERIODIC REPORTING: TECHNICAL REPORTS AND FINANCIAL STATEMENTS

The beneficiaries must provide reports to request payments, in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2). For QUANTIFY project two periodic reports are requested for the interim payment (M18) and the final payment (M42), as reported in *Table 1. Reporting and payment schedule*.

Table 1. Reporting and payment schedule

Reporting					Payments	
Reporting periods			Type	Deadline	Type	Deadline (time to pay)
RP No	Month from	Month to				
					Initial prefinancing	30 days from entry into force/10 days before starting date – whichever is the latest
1	1	18	Periodic report	60 days after end of reporting period	Interim payment	90 days from receiving periodic report
2	19	42	Periodic report	60 days after end of reporting period	Final payment	90 days from receiving periodic report

The periodic report (*EU GA Article 21.2*) must be submitted by the project coordinator **within 60 days** following the end of each reporting period. This report must include explanations for any deviations (budget and content) from the DoA (*EU GA: Annex 1*). In details, the periodic reports include a technical and financial part.



The **technical part** includes an overview of the action implementation. The information in the Continuous reporting Portal is automatically compiled to create the part A of the periodic Technical Report.

The **technical report** consists of two parts; Part A and Part B:

- A) Part A** is generated by the IT system. It is based on the information entered by the participants through the periodic report and continuous reporting modules of the electronic exchange system in the Participant Portal. The participants can update the information in the continuous reporting module at any time during the life of the project. Part A contains:
- the cover page;
  - a summary which can be used for publications by the EC;
  - the answers to the questionnaire (covering issues related to the project implementation and the economic and social impact).

The project coordinator is responsible for part A.

- B) Part B** is the narrative part that includes explanations of the work carried out by the beneficiaries during the reporting period. Part B needs to be uploaded as a PDF document following the template of Part B Periodic Technical report.

WPLs compile a report on their WP together with their TLs (Part B) and send it to the project coordinator one month before the deadline for uploading it in the participant portal. The project coordinator consolidates the provided information and sends the complete periodic technical report to the consortium for review. The final approved version will be uploaded in to the Participant Portal by the project coordinator.

The Periodic Report Template (Part A and B) can be found on the EC website under:

[https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/temp-form/report/periodic-report\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/temp-form/report/periodic-report_horizon-euratom_en.pdf)

The **financial part** of the periodic report includes:

- the financial statements (individual and consolidated; for all beneficiaries/affiliated entities);
- the explanation on the use of resources (or detailed cost reporting table, if required);
- the certificates on the financial statements (CFS), requested only at the final payments, if threshold is reached (EU contribution to costs  $\geq$  430.000,00 euros); *Article 24.2 and Data Sheet, Point 4.3.*

The financial statements must detail the eligible costs and contributions for each budget category and, for the final payment, also the revenues for the action (*Articles 6 and 22 in the GA*).

All eligible costs and contributions incurred should be declared, even if they exceed the amounts indicated in the estimated budget (*Annex 2*). Amounts that are not declared in the individual financial statements will not be taken into account by the granting authority.

In addition to the periodic report for the last reporting period, the coordinator must submit the final report **within 60 calendar days** following the end of the last reporting period.

The Periodic Reporting Module (and periodic reports) are also used for the **final report** (report for the last reporting period, to close the grant). The system behavior, screens and documents used are the same.

## FINANCIAL REPORTING IN DETAIL

### BUDGET

The budget contains the estimated eligible costs and contributions for the action, broken down by Partner (and linked third party) and budget category (*EU GA: Article 5 - Grant and Article 6 – Eligible and ineligible costs and contributions*).

The estimated budget for the action is set out in *Annex 2*.

The budget is based on estimated costs and person months. Frequent internal reporting assures that these budgets are monitored well and that under- and over spending is noticed at an early stage. Please note that in reporting, actual costs must be reported and not budgeted ones.

The general eligibility conditions are listed in *Article 6.1*, the budget categories are listed in the *Article 6.2* and *Article 6.3* lists the ineligible costs and contributions.

The budget categories are:

#### Direct costs

##### A. Personnel costs

**A.1 Costs for employees (or equivalent)** are eligible as personnel costs if they fulfil the general eligibility conditions and are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action;

**A.2 and A.3 Costs for natural persons working under a direct contract** other than an employment contract and costs for seconded persons by a third party against payment are also eligible as personnel costs;

**A.4** The work of **SME owners** for the action or **natural person beneficiaries**;

##### B. Subcontracting costs

##### C. Purchase costs

**C.1 Travel and subsistence** (travel, accommodation and subsistence);

**C.2 Equipment** (equipment, infrastructure or other assets);

**C.3 Other goods, works and services**;

##### D. Other cost categories

**D.2 Internally invoiced goods and services**

#### Indirect costs

E. **Indirect costs** will be reimbursed at the flat-rate of 25% of the eligible direct costs (categories A-D, except volunteers costs, subcontracting costs, financial support to third parties and exempted specific cost categories, if any).

## INDIVIDUAL FINANCIAL STATEMENT – DECLARATION OF ELIGIBLE COSTS

The individual financial statement needs to be submitted electronically by each partner to the EU through the Participant Portal (*EU GA: Annex 4*).

**The procedure below needs to be updated once this process is available in the EU Participant Portal of the Project.**

1. Login to the Participant Portal
  - a. To be able to login to the Participant Portal you need to have an ECAS (European Commission Authentication Service) password
  - b. Go to the sign-up page and create your ECAS account. Make sure you selected the right domain: External
2. Choose the tab 'my Projects'. If QUANTIFY is not listed, contact the project coordinator of INRiM, Giulia Aprile.
3. Click in the column 'Actions' on 'PR' (=Periodic Reporting).
4. Click under your organisation on the 'Financial statement' menu. Fill in the requested information with explanations.
5. Once everything is filled, press "save".
6. Then click on the button "inform F-sign", the F-sign will be asked by e-mail to sign the financial statement electronically. If an organisation has not yet added a F-sign to the project (the PF-sign), the LEAR needs to be contacted. The LEAR needs to nominate a F-sign for the organisation and then the participant contact needs to add the F-sign to the project.
7. The PF-sign then needs to submit the financial statement to the coordinator.
8. The coordinator will make a final check and then submit the financial statements including all reports to the EU through the Participant Portal.

## AUDIT – CERTIFICATE ON THE FINANCIAL STATEMENTS

A Certificate on the Financial Statements (CFS) is requested for each partner in case of total contribution of EUR 430.000,00 or more, as reimbursement of actual costs and unit costs. This means excluding the reimbursement of indirect costs (25%).

Article 24.2 describe the conditions required by the granting authority for the CFS.

## 6.2 Project activity and management report

Project activity and management reports are **deliverables** of the project (D1.3, D1.4, D1.5 and D1.6), meaning that they are sent to the EU. They are compiled approximately every 12 months. The objective of these reports is to monitor project expenditure and technical progress. It should be a brief summary of the technical work completed as well as a brief explanation for any deviations (budget and content) from the DoA (*Annex 1*).

This report includes:

- A description of the **technical progress**, per work package (Project objectives for the period, Work progress and achievements during the period, Deliverables and milestones tables)  
**WPLs** are responsible to gather all information about the technical progress in their WP from their task leaders and compile a WP report before sending it to the coordinator.
- A **management and financial overview** from each partner.  
The process of handing in the management and financial overview goes as follows: 1) The project coordinator provides an Excel template, three months before the first deadline; 2) This template should be filled out by all the consortium partners. This excel sheet provides the coordinator with valuable information needed for monitoring purposes and management reporting (explanation of use of the resources (*financial overview*), communication and dissemination activities – plenary meetings, EB meetings, Critical risks & risk management strategy – *the contingency plan*); 3) The coordinator consolidates the provided information and upload the complete report on the SharePoint, after that the report (deliverable D1.3, D1.4, D1.5 and D1.6) will be upload to the European Participant Portal.

## 6.3 Reporting Calendar

To ensure timely submission the partners should respect the deadlines set in the following *Table 2. Reporting calendar*.

In addition to this reporting period, with the aim to maximize the monitoring of the project progress and every technical issue, the Executive Board will meet together every month, by teleconference.

Table 2. Reporting calendar

Kind of report	Period covered	Template ready and uploaded to the SharePoint by project coordinator	Deadline to send to project coordinator	By whom?	Finalised & submitted to EC by project coordinator
Project activity and management report - 1	Jan 2024 – Dec 2024 (M01 – M12)	Sept. 2024 (M09)	Nov 2024 (M11)	All consortium partners	D1.3 – Project activity and management report
<b>First interim review (RV1)/Periodic report</b>	<b>Jan 2024 - Jun 2025 (M01-M18)</b>	<b>NA</b>	<b>May 2025 (M17)</b>	All consortium partners	<b>Jun 2025 (M18)</b>
Project activity and management report - 2	Jan 2025 – Dec 2025 (M13 – M24)	Sept. 2024 (M09) – <i>eventually updated</i>	Nov 2025 (M23)	All consortium partners	D1.4 – Project activity and management report, DMP update
<b>Technical interim review (RV2)</b>	<b>Jun 2025 – Jun 2026 (M18 – M30)</b>	<b>NA</b>	<b>May 2026 (M29)</b>	All consortium partners	<b>Jun 2026 (M30)</b>
Project activity and management report - 3	Jan 2026 – Ago 2026 (M25 – M32)	Sept. 2024 (M09) – <i>eventually updated</i>	Jul 2026 (M31)	All consortium partners	D1.5 – Project activity and management report
<b>Final review (RV3)/Final report/ Project activity and management report - 4</b>	<b>Jul 2026 – Jun 2027 (M31 – M42)</b>	<b>NA/</b> Sept. 2024 (M09) – <i>eventually updated</i>	<b>May 2027 (M41)</b>	All consortium partners	D1.6 – Project final report and DMP update, QUANTIFY achievements, follow-up activities and goals. <b>June 2027 (M42)</b>

## 6.4 Keeping records and supporting documents

The beneficiaries must — at least for 5 years (or 3 for grants of not more than EUR 60 000) — keep records and other supporting documents to prove the proper implementation of the action in line with the accepted standards in the respective field (if any).

In addition, the beneficiaries must — for the same period — keep the following to justify the amounts declared:

- for actual costs: adequate records and supporting documents to prove the costs declared (such as contracts, subcontracts, invoices and accounting records); in addition, the beneficiaries' usual accounting and internal control procedures must enable direct reconciliation between the amounts declared, the amounts recorded in their accounts and the amounts stated in the supporting documents;
- for flat-rate costs and contributions (if any): adequate records and supporting documents to prove the eligibility of the costs or contributions to which the flat-rate is applied;

- for the following simplified costs and contributions: the beneficiaries do not need to keep specific records on the actual costs incurred, but must keep:
  - for unit costs and contributions (if any): adequate records and supporting documents to prove the number of units declared;
  - for lump sum costs and contributions (if any): adequate records and supporting documents to prove proper implementation of the work as described in Annex 1;
  - for financing not linked to costs (if any): adequate records and supporting documents to prove the achievement of the results or the fulfilment of the conditions as described in Annex 1
- for unit, flat-rate and lump sum costs and contributions according to usual cost accounting practices (if any): the beneficiaries must keep any adequate records and supporting documents to prove that their cost accounting practices have been applied in a consistent manner, based on objective criteria, regardless of the source of funding, and that they comply with the eligibility conditions set out in Articles 6.1 and 6.2.

Moreover, the following is needed for specific budget categories:

- for personnel costs: time worked for the beneficiary under the action must be supported by declarations signed monthly by the person and their supervisor, unless another reliable time-record system is in place; the granting authority may accept alternative evidence supporting the time worked for the action declared, if it considers that it offers an adequate level of assurance

The records and supporting documents must be made available upon request (see Article 19) or in the context of checks, reviews, audits or investigations (see Article 25).

If there are on-going checks, reviews, audits, investigations, litigation or other pursuits of claims under the Agreement (including the extension of findings; see Article 25), the beneficiaries must keep these records and other supporting documentation until the end of these procedures.

The beneficiaries must keep the original documents. Digital and digitalised documents are considered originals if they are authorised by the applicable national law. The granting authority may accept non-original documents if they offer a comparable level of assurance.

## 6.5 Budget transfers

With the consent of the Project Executive Board a re-distribution of person-months between partners may be considered. This re-distribution is allowed without requesting an amendment (*EU GA: Article 5.5*) provided that it does not imply a substantial change to the action as described in the EU GA. All other re-allocations of budget items need to be discussed in order to decide whether to apply for an amendment to the EU GA.

**The maximum grant amount (*EU GA: Article 5*) can however NEVER be increased.**

## 7. Payments

The following types of payments are foreseen (as reported in *Table 1. Reporting and payment schedule*):

1. Pre-financing at the start of the project (80%\*).  
Pre-financing funds remain EU property until they are 'cleared' against eligible costs accepted by the European Commission.
2. Interim payment following the approval of the periodic report (15%).  
After approval of the formal periodic report an interim payment will be issued.  
Periodic Report: 2024 Jan (M01) - 2025 Jun (M18) Second
3. Final payment following the approval of the final report (5%).  
The final payment will be transferred after the approval of the final report and consists of the difference between the calculated EU contribution (on the basis of the eligible costs) minus the amounts already paid.

*\* The 5% of the maximum grant amount (150.000,00), was retained from the initial prefinancing. This 5% is referred to the Mutual Insurance Mechanism (MIM). The MIM is similar to an insurance scheme for all beneficiaries by providing security against certain defaults in payment (Guarantee Fund in H2020). This amount will be transferred back to the Coordinator at the end of the action.*

## 8. Deliverables

### 8.1 List of Deliverables & Milestones in chronological order

Del. N°	Deliverable Name	WP N°	Lead Part.	Type	Diss. level	Del. date	
D1.1	Project management handbook, standard documentations, and internal document repository and management.	1	INRiM	R	PU	M02	Feb 2024
D1.2	Data Management Plan	1	INRiM	DMP	PU	M06	Jun 2024
D7.1	Communication, dissemination and exploitation Plan	7	INRiM	R	PU	M06	Jun 2024
D7.2	Communication Pack	7	INRiM	DEC	PU	M06	Jun 2024
D1.3	Project activity and management report	1	INRiM	R	PU	M12	Dec 2024
D2.1	Narrow-linewidth photonic integrated tunable laser at 780 nm and 1550 nm	2	LXI	DEM	SEN	M18	Jun 2025
D2.2	Realization of PIC and MEMS components	2	CSEM	DEM	SEN	M18	Jun 2025
D5.1	Report on design and preliminary characterization of the optomechanical resonator	5	TRT	R	PU	M18	Jun 2025
D2.3	Photonic integrated laser, squeezers and OMO on Triplex™ motherboard	2	UGent	DEM	SEN	M24	Dec 2025
D3.1	OPM-MEMS vapor cell development and characterization report	3	ICFO	R	SEN	M24	Dec 2025
D3.2	Quantum enhancement protocol report	3	ICFO	R	PU	M24	Dec 2025
D5.2	Quantum thermometry measurement protocol	5	USo	R	SEN	M24	Dec 2025
D7.3	Establish a review for the Communication, dissemination and exploitation Plan & further development strategy to continue developments beyond the end of the project	7	INRiM	R	PU	M24	Dec 2025
D1.4	Project activity and management report, DMP update	1	INRiM	R	PU	M24	Dec 2025
<b>M1</b>	<b>PICSq</b>	<b>2</b>	<b>UGent</b>	<b>R</b>		<b>M25</b>	<b>Jan 2026</b>
<b>M5</b>	<b>Measurement set-up for the self-calibrated thermometer linked to the traceability chain</b>	<b>6</b>	<b>INRiM</b>	<b>R</b>		<b>M28</b>	<b>Apr 2026</b>
<b>M6</b>	<b>Measurement set-up for the OPM metrological characterization linked to the traceability chain</b>	<b>6</b>	<b>INRiM</b>	<b>R</b>		<b>M28</b>	<b>Apr 2026</b>
<b>M7</b>	<b>Measurement set-up for the TPOC metrological characterization linked to the traceability chain</b>	<b>6</b>	<b>INRiM</b>	<b>R</b>		<b>M28</b>	<b>Apr 2026</b>
D4.2	Report on TPOC stability assessment using squeezed state of light.	4	CSEM	R	PU	M30	Jun 2026
D3.3	Photonic-integrated squeezer development and characterization report	3	ICFO	DEM/R	SEN	M30	Jun 2026
<b>M2</b>	<b>Quantum protocol of TPOC</b>	<b>4</b>	<b>CSEM</b>	<b>R</b>		<b>M30</b>	<b>Jun 2026</b>
D1.5	Project activity and management report	1	INRiM	R	PU	M32	Aug 2026
D4.1	Report on TPOC development and characterization with PIC-laser and MEMS cell.	4	CSEM	R	SEN	M36	Dec 2026
D7.4	Establish a technology validation plan for the photonic integrated squeezed light source and its commercial exploitation by the UHH spin-off <i>Noisy Labs</i>	7	UHH	R	SEN	M36	Dec 2026
<b>M3</b>	<b>TPOC operation with miniaturized OLOSS and MEMS cell</b>	<b>4</b>	<b>CSEM</b>	<b>R</b>			<b>Dec 2026</b>
D3.4	Quantum-enhanced OPM for Earth-field operation demonstrator	3	ICFO	DEM	SEN	M41	May 2027



D4.3	Report on quantum enhanced TPOC with PICSq and MEMS cell.	4	CSEM	R	PU	M41	May 2027
D5.3	Report on thermometry measurement with a hybrid nano-optomechanical resonator and PIC laser	5	LNE	R	PU	M41	May 2027
D6.1	Report on the metrological characterization of the photonic integrated squeezed light source	6	UHH	R	SEN	M41	May 2027
D6.2	Report on the metrological characterization of the optomechanical thermometer	6	INRiM	R	PU	M41	May 2027
D6.3	Report on the metrological characterization of the OPM	6	INRiM	R	PU	M41	May 2027
D6.4	Report on the metrological characterization of the TPOC	6	INRiM	R	PU	M41	May 2027
D7.5	Final Exploitation, Dissemination and Impact report	7	UHH	R	PU	M41	May 2027
<b>M4</b>	<b>OPM operation with PICSq and MEMS cell</b>	<b>3</b>	<b>ICFO</b>	<b>R</b>		<b>M41</b>	<b>May 2027</b>
D1.6	Project final report and DMP update, QUANTIFY achievements, follow-up activities and goals.	1	INRiM	R	PU	M42	Jun 2027

## 8.2 Approval process of deliverables

All the deliverables must be finalized and submitted within the deadlines defined in Annex I to the Grant Agreement. All deliverables shall be submitted to the European Commission, by electronic means via the Participant Portal.

The work package leaders and the task leaders are responsible for the technical quality of the deliverables. In particular, WPLs are responsible for their WP deliverables.

In order to ensure the quality of the delivery to be submitted, the following procedure to review each deliverable has been defined:

- 1) Before the month of the deliverable deadline, the WPL and the author(s) (task leaders) discuss which internal expert(s) will review the first final draft version; at the same time the WPL reviews it. The WPL approaches the internal expert(s) for confirmation.
- 2) On the first day of the month of the deliverable deadline, the author sends the first final draft version of the deliverable to their WPL, the appointed internal expert(s) and the project coordinator ([g.aprile@inrim.it](mailto:g.aprile@inrim.it)).
- 3) Within the following two weeks, the WPL and the appointed internal expert(s) review the first final draft version of the deliverable. On the 14<sup>th</sup> of the month of the deliverable deadline, they must send their comments to the author. Then the author has one week to adjust the document where necessary.
- 4) On the 21<sup>st</sup> of the month of the deliverable deadline, the author sends the second final draft version to the Project coordinator. The deliverable must be sent by using the standard template available on the SharePoint.
- 5) The Project coordinator has one week to do a final check. On the last working day of the month, the project coordinator will upload the document to the Participant Portal and place a copy on the SharePoint.

In case of delay, the WP leader will communicate to the Project Coordinator the situation and along with the lead partner in charge of the deliverable, they will analyse how to address the problem and they will define a new date for submission of the deliverable as soon as possible. If this happens, the Project Coordinator informs the EC project officer as soon as possible.

### 8.3 Timetable of quality review process:

Submit date	Action
Before the month of the deadline	The author (task leader) discusses with the WPL which internal expert(s) will be asked to review the first final draft of the deliverable. Commitment from this will need to be confirmed.
1 <sup>st</sup> of the month of deadline deliverable	Author sends the first final draft version of the deliverable to the WPL, the appointed internal expert(s) and the project coordinator ( <a href="mailto:g.aprile@inrim.it">g.aprile@inrim.it</a> ). <i>The WPL and as well as the appointed internal expert(s) review the deliverable separately and provide it with comments (two weeks).</i>
14 <sup>th</sup> of the month of deadline deliverable	WPL and internal expert(s) send their comments to the author. <i>Author adjusts the deliverable where necessary (one week).</i>
21 <sup>st</sup> of the month of deadline deliverable	Author sends the second final draft version of the deliverable to the project coordinator. <i>Project coordinator does a final check (one week).</i>
Last working day of the month	Project coordinator uploads the final document to the Participant Portal and places a copy on the SharePoint Team.

## 9. Dissemination and Exploitation of results and Open access

The beneficiaries must disseminate their results as soon as feasible, in a publicly available format, subject to any restrictions due to the protection of intellectual property, security rules or legitimate interests. Some of the classic forms of dissemination are:

- QUANTIFY website;
- Peer reviewed publication (open access);
- Presentation at a scientific conference.

The dissemination measures should however be consistent with the 'Communication, Dissemination and Exploitation Plan' (D7.1, M6, June 2024) and proportionate to the impact expected from the action. This document will provide with more guidelines.

When deciding on dissemination, the partners must also consider the other partners' legitimate interests.

### 9.1 Open access to scientific publications

The specific rules regarding the open access to scientific publications are reported within the Article 17 of the *Annex 5 – Specific Rules*.

Each partner should ensure open access (free of charge online access for any user) to all peer reviewed scientific publications relating to its results. In particular, all the partners are invited to choose gold open access journals with CC BY 4.0 license. This license enables reusers to distribute, remix, adapt, and build upon the material in any medium or format, so long as attribution is given to the creator. The license allows for commercial use. With the CC BY license credit must be given to the creator. For this reason, this is the only license compliant with the EC Open Access rules.

In addition, each partners should: a) as soon as possible and at the latest on publication, deposit

a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication within Zenodo (trusted repository choose by the Consortium), within the QUANTIFY Community (<https://zenodo.org/communities/quantify?q=&l=list&p=1&s=10&sort=newest>); b) ensure open access — via the previous repository — to all the information about any research output or any other tools and instruments needed to validate the conclusions of the scientific publication.

Beneficiaries (or authors) must retain sufficient intellectual property rights to comply with the open access requirements.

Metadata of deposited publications must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent, in line with the FAIR principles (in particular machine-actionable) and provide information at least about the following:

- publication (author(s), title, date of publication, publication venue);
- Horizon Europe funding;
- grant project name, acronym and number;
- licensing terms;
- persistent identifiers for the publication, the authors involved in the action and, if possible, for their organisations and the grant.

Where applicable, the metadata must include persistent identifiers for any research output or any other tools and instruments needed to validate the conclusions of the publication.

CC0 is a public dedication tool, which enables creators to give up their copyright and put their works into the worldwide public domain. CC0 enables reusers to distribute, remix, adapt, and build upon the material in any medium or format, with no conditions.

**Only publication fees in full open access venues for peer-reviewed scientific publications are eligible for reimbursement.**

## 9.2 Research data management

The beneficiaries must manage the digital research data generated in the action ('data') responsibly, in line with the FAIR principles and by taking all of the following actions:

- establish a data management plan (D1.2 – Data Management Plan, M6, June 2024), and regularly update it (D1.4 – Project activity and management report, DMP update, M24, December 2026, D1.6 – Project final report and DMP update, QUANTIFY achievements, follow-up activities and goals, M42, June 2027);
- as soon as possible and within the deadlines set out in the DMP, deposit the data within the Zenodo Community;
- as soon as possible and within the deadlines set out in the DMP, ensure open access - via the repository - to the deposited data, under the latest available version of the Creative Commons Attribution International Public License (CC BY), following the principle 'as open as possible as closed as necessary', unless providing open access would in particular:
  - be against the beneficiary's legitimate interests, including regarding commercial exploitation, or
  - be contrary to any other constraints, in particular the EU competitive interests or the beneficiary's obligations under this Agreement; if open access is not provided (to some or all data), this must be justified in the DMP.
  - Provide information via the repository about any research output or any other tools and instruments needed to re-use or validate the data.

Metadata of deposited data must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent (to the extent legitimate interests or constraints are safeguarded), in line with the FAIR principles (in particular machine-actionable) and provide information at least about the following:

- datasets (description, date of deposit, author(s), venue and embargo);
- Horizon Europe funding;
- grant project name, acronym and number;
- licensing terms;
- persistent identifiers for the dataset, the authors involved in the action, and, if possible, for their organisations and the grant.

Where applicable, the metadata must include persistent identifiers for related publications and other research outputs.

### 9.3 Dissemination of results: rules

The complete rules for dissemination (*The public disclosure of the results by appropriate means, other than resulting from protecting or exploiting the results, including by scientific publications in any medium*, definition from Annex 5 - GA) are covered in *Section 8.4 - Dissemination* of the CA and in Article 17 of the EU GA. In particular the point *17.4 - Specific communication, dissemination and visibility rules* pointed to the Article 17 of the *Annex 5 – Specific Rules*.

More concrete, the partner intends to disseminate (publish, present or disclose) information about the project must follow the following procedure:

- Send an email at least **15 calendar days** (unless agreed otherwise\*) before publication/presentation/disclosure of information to the whole consortium. Provide the foreseen title, list of contributing authors, abstract of the content and the purpose of the publication;
- Any objections to the planned publication can be made within **15 calendar days** (unless agreed otherwise\*) after receipt of the notice; if no objection is made within the time limit stated above, the publication is permitted.
- An objection is justified if:
  - a. the objecting party's legitimate academic or commercial interests in relation to the results or background would be significantly harmed;
  - b. the projection of the objecting party's results or background is adversely affected.
- The objection has to include a precise request for necessary modifications.
- The objecting partner can request a publication delay of not more than 30 calendar days from the time it raises such an objection. After 30 calendar days the publication is permitted, provided that Confidential information has been removed from the publication as indicated by the objecting partner.

A partner shall not include in any dissemination activity another partner's results or background without obtaining written approval, unless they are already published.

The author informs the project coordinator when the planned publication has been accepted for publishing (for monitoring proposes).

\* If a partner needs to receive a response from the beneficiaries in less than 15 days, they have to contact the project coordinator, providing the necessary information. The project coordinator will contact the beneficiaries requesting a response in a shorter time.

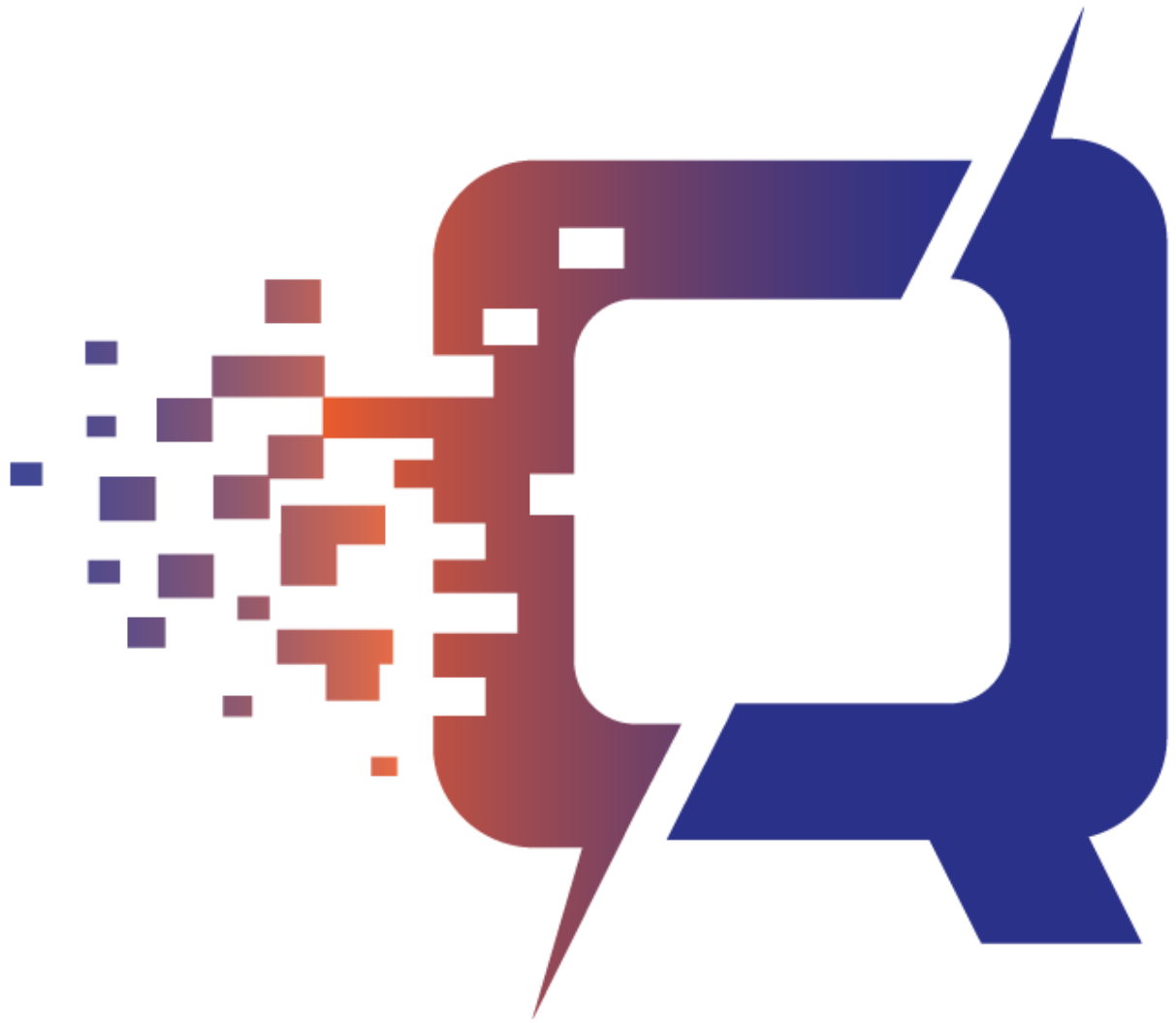
## 9.4 Exploitation of results: rules

The complete rules for exploitation (i.e. the use of results in further research and innovation activities other than those covered by the action concerned, including among other things, commercial exploitation such as developing, creating, manufacturing and marketing a product or process, creating and providing a service, or in standardisation activities, definition from Annex 5 - GA) are covered in Article 16 of the Annex 5 – Intellectual property rights — background and results — access rights and rights of use.

Beneficiaries which have received funding under the grant must — up to four years after the end of the action (see Data Sheet, Point 1) — use their best efforts to exploit their results directly or to have them exploited indirectly by another entity, in particular through transfer or licensing.

If, despite a beneficiary's best efforts, the results are not exploited within one year after the end of the action, the beneficiaries must (unless otherwise agreed in writing with the granting authority) use the Horizon Results Platform to find interested parties to exploit the results.

If results are incorporated in a standard, the beneficiaries must (unless otherwise agreed with the granting authority or unless it is impossible) ask the standardisation body to include the funding statement (see Article 17) in (information related to) the standard.



**QU**antum Enh**AN**ced  
Pho**T**onic Integrated Sensors  
For Metrolog**Y**